

**2018 Annual Assessment Report (AAR) Checklist**

Municipality:				Muni Code		Date:		
Assessor:				DOR Reviewer				
		Full Revaluation:		:Exterior Reval		Int Mrkt Update:		
Not required, suggested		Required if Applicable		Required				
Pre-filled data		Partial requirement		Not Required		NOTES and Attachments not Required but		
AAR Page	DOR Reviewer Instruction	Yes	No	Field	Notes			
Page 2- Assessment Information	Verify Assessment Type and Historical Assessment Type, Software Vendor, comment if Software is not supported			Assessment Type				
				Historical				
				Software				
				Year of last Update				
Page 2 Estimated Level of Assessment	Line populated ?			Percent				
Page 2 Assessment Help	Did the assessor list help ?			Names				
Page 2 Check Box #1	Additional staff provided as attachment ?			Attachment				
<b>SECTION 1 General Municipality Information</b>								
Page 3 Municipality description	General description adequate ?			TEXT				
Page 3 Box #2	Section 1 general description attachment		x	Attachment				
<b>SUMMARY OF REQUIREMENTS</b>								
Page 3	DATES							
	1. Assessors oath							
	2. Mailed Notice of Assessment							
	3. Signed Affidavit/attached roll							
	4. Submitted to DOR							
	MAR							
	TAR							
	5. Corrections and omissions discovery							
	Discovered, corrected omitted property			YES NO or NA				
	Provided property owners with written notice of appeal rights			YES NO or NA				
	6. Open Book Information							
	Date of First Open Book			DATE				
	Number of Parcels Reviewed							
	Revised Notices Sent			YES NO or NA				
	7. Board of Review Information							
	Date of first BOR			DATE				
	Reschedule date if needed			YES NO or NA				
	Assessor attended BOR ?			YES NO				
	8. Palpable errors or omitted parcels:							
	Reviewed and reval property in error and cert. value with clerk			YES NO or NA				
	Verified with clerk, palpable error or omitted property was added to roll			YES NO or NA				
	Page 4	9. Property inspection:						
		Number field inspected			Number			
		Inspection (interior, exterior, drive-by)			Type			
		10. Property Sales			Number			
		11. Valid Sales						
		Reviwed for Validity			Number			
		Total Number of Valid Sales			# of sales on page 7			
Number Inspected				Number				
12. Building permits:								
Total number of building permits				Number				
Number field inspected				Number				
13. New Construction:				Number				
Number of inspections:				Number				
Analyzed new construction				YES NO NA				
14. Agricultural parcels				Number				
Total number of parcels				Number				
Total number of inspections				Number				
Type of inspections				Number				
On-site				Checkboxes				
Drive -by				Checkboxes				
On-line Maps, etc.				Checkboxes				
15. Updated Ag Values with DOR values adjusted to assessment level				YES NO NA				
16. Personal property:								
Discovered				YES NO NA				
Date returns sent				DATE				
Valued				YES NO NA				
17. Conducted ratio study for:								
Previous assessment date				YES NO NA				
Current Assessment Date				YES NO NA				
<b>SECTION 2-Scope of Work</b>								
Page 5		Class 1			PARCEL COUNT	Percent by Full Revaluation Exterior, Interim market update		
		Class 2						
	Class 4							
	Class 5							
	Class 5 m							
	Class 6							
	Class 7							
	Personal Property							

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Pre-filled data		Partial requirement				NOTES and Attachments not Required but	
AAR Page		DOR Reviewer Instruction		Yes	No	Field	Notes
Page 6		Scope of Work Notes				TEXT	
Page 6 Box #3		Box #3 Scope of work as an attachment				Attachment	
Section 3- Assessment Statistics							
Page 7		Number of Valid Sales					NOTE: 2015 data pre-filed if applicable
		Total assessment of valid sales parcels					
		Total Sales Price of Valid sales Parcels					
		Aggregate ratio					
		Mean					
		Median					
		Coefficient of Dispersion					
		COC					
		PRD					
Page 7 Statistics Notes:		Did assessor provide notes ?					
Page 7 Box #4		Check box Section 3 Statistics Notes ?					
Section 4-Valuation							
Valuation Summary Page 8		Residential				Percent	
		Commercial				Percent	
		Agricultural				Percent	
		Undeveloped				Percent	
		Agric Forest				Percent	
		Prod Forest				Percent	
		Other				Percent	
		P1- Boats and other watercraft				Percent	
		P3- Furniture, fixtures,equipment				Percent	
		P4A-Other				Percent	
		P4-B Buildings on Leased Land					
		Mobile Homes				Number	
Page 9 Analysis of Local Trend		Number of sales-verify with Page 7				Number/Dates	
Page 9 Methods used to determine the market trend		Did the assessor check a box for the methods used to determine a trend ?				Outside sources	
						Square Foot	
						Paired Sales	
						Regression	
						Insufficient sales	
Page 9 Dates and % per year		Provide % influencing class of property ?				Residential %	
						Commercial%	
Page 9 Trend Explantion Text Box		Narrative ?				Text Box	
Page 9 Box #5 Section 4 Trends		Check box #5, attachments present ?				Attachments	
Section 5-Land Valuation							
Page 10 B Land sales by class		If land sales NOT provided check X in NO					
Page 10 B Vacant Land Sales by Class Code		Did the assessor provide a number of vacant land sales ?				Residential #	
						Commercial #	
						Agricultural #	
						Undeveloped #	
						Ag Forest #	
						Prod Forest #	
Page 10 Land Appraisal Methods:		Note method used and make comments				Check Box	Seven Methods and Other
Page 11 Value Range Land		Unit values, square foot, acres for Class of Property				Unit value range for 7 types	Class 1
							Class 2
							Class 4
							Class 5
							Class 5m
							Class 6
							Class 7
Influence Factors							
Page 12 Influence Factors by Class Type		NOT having a reason for influences in a neighborhood or jurisdiction is something to comment on				NOTES	Residential
						NOTES	Commercial
						NOTES	Agricultural
						NOTES	Undeveloped
						NOTES	Agri Forest
						NOTES	Prod Forest
						NOTES	Other
Page 12 Land Valuation Notes		Narrative on how land is valued?				NOTES	
Page 12 Box #6 Attachment		Check box #6 Land Valuation data Notes ?				Attachment	
Page 12-13 Section 6 Improved Property Valuation							
Page 12 Cost Approach		Techniques used to determine model specification. Systems must be capable of creating a cost value for comparrison				Volume II	
						Marshall Valuation	
						Own Model	
						Other cost-identify	
Page 12 Specification		Explain specifications of cost techniques				Text Box	
Page 12 Check Box #7		Check box 7? 6A-1 cost attachments				Check Box with attachments	
Page 13 Techniques used to determine						Vol II check box	
						Marshall Check Box	
						Own Cost Check Box	

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AAR Page	DOR Reviewer Instruction	Yes	No	Field	Notes		
Page 13 Techniques used to determine model calibration	Sales comparison model validated?			Validated VII multiplier			
				Developed own depreciation tables			
Page 13 Calibration Text Box	Notes in the Text Box?			Text Box			
Page 13 Check Box #8	Attachment: 6A 2 Cost calibration			Attachment			
Page 14 Cost Approach Notes	Cost approach notes provided?			Text Box			
Page 14 Specification Attachments labeled Section 6A. 3-4 Cost Approach Notes	Did the assessor check a box # 9 and include attachment Section 6A 3-4 Cost Approach Notes			Attachment			
Page 14 Sales Specifications	Which box was checked			Check Boxes	Sales Comparison		
					Multiple regression analysis		
					Other Explain		
					Not applicable-insufficient sales		
Page 14 Model Specification	Were model specifications provided?			Text Box			
Page 14 Check Box #10	Check box #10 Section 6B.1 Sales Comparison Approach Specification ?			Attachment			
Page 14 Sales NOT used	Comments on the Sales NOT used ?			Text Box			
Page 14 Check Box #11	Is the Box #11 checked Section 6B, 1a Sales Not Used ?			Attachment			
Page 15 Calibration							
Page 15 Calibration	Were Calibration Techniques Identified			Check Boxes			
				Sales listing property attributes			
				Sales comparables			
				Multiple regression analysis			
				Other			
		NA, Insufficient Sales					
Page 15 Calibration Explanation	Notes on Calibration Provided ?			Text Box	Explanation provided does not detail process		
Page 15 Text Box #12	Section 6B.2 Sales Calibration			Attachment			
Page 15 (3) Sales validation	Check box validating sales model ?			Check Box	Comparing estimates - model to sales price		
					Other		
					NA/Insufficient sales		
Page 15 Sales Notes	Notes provided on sales comparison			NOTES			
Page 15 Check Box #13	Section 6B.3-Sales Validation			Attachment			
Page 16 Income Approach							
1.) Specifications Income Approach	Are boxes checked ?			Check Box	Direct Capitalization		
					Yield Capitalization		
					Other		
					NA		
2.) Calibration Income Approach	Are boxes checked ?			Check Box	Data from Market		
					Data from Professional sources		
					Other		
					NA		
3.) Validation	Are boxes checked ?			Check Box	Comparing estimates - model against sales price		
					Other		
					NA-insufficient sales		
Page 16 Income Approach Notes	Notes on Income Approach Provided ?			Notes			
Page 16 Box #14	Section 6C Income attachment ?			Attachment			
Page 17							
Page 17 Additional Comments	Are there additional comments ?			Notes			
ATTACHMENT LIST							
<b>All assessment types-required attachments</b> <ul style="list-style-type: none"> <li>Affidavit</li> <li>Assessment notice</li> <li>Name(s) of help</li> <li>PRC sample(s)</li> <li>Summary of Open Book Actions (Form PR-130)</li> </ul>				<b>Any assessment type – optional attachments</b> <ul style="list-style-type: none"> <li>BOR notice</li> <li>Contract</li> <li>Map(s)</li> <li>There is no limit to the number of attachments you provide with your report</li> </ul>			
<b>Revaluations and interim market update-required attachments</b> <ul style="list-style-type: none"> <li>Revaluation notice</li> <li>Sales used</li> <li>Sales not used</li> <li>Valuation analysis (cost, income, sales)</li> </ul>				Comments:			